

APPENDIX 4

BACKGROUND REPORTS REVIEW

Introduction

A4.1 This appendix provides a review of key background documents relating to the region and sub-region which set the context for Halton, Knowsley, Sefton and West Lancashire's employment land and property markets. It commences with commentary on North West regional reports, continues with Liverpool City Region/Merseyside documents and concludes with individual local authority district-related reports.

North West Employment Land Study (NWDA, 2005)

A4.2 The North West Employment Land Study analysed allocated employment sites, in excess of 5 ha, in each of the five sub-regions. Halton, Knowsley and Sefton are included in the Merseyside and Halton sub-region. West Lancashire is included in Lancashire.

A4.3 The study analysed employment sites in terms of both a Market Score (including commercial viability, local market conditions, site internal quality characteristics) and a Planning Policy and Sustainability Score.

A4.4 The analysis classed 19 sites in the study area as being within the 'top third tier and available for development' category according to either the Market or Sustainability Score. These are listed in Table A4.1.

A4.5 Twelve of the sites are in Halton; five are in Sefton, with two in West Lancashire. Knowsley sites do not feature in this category. Only two sites, both in Halton, are included in both the Market and Sustainability rankings.

A4.6 One Knowsley site is included within the sustainability score-ranked 'top third tier but unavailable for development for three years'. This is the only site within the study area to be found in this ranking.

**Table A4.1 – Halton, Knowsley, Sefton and West Lancashire Employment Sites.
Availability and Deliverability Rankings – Top Tier**

ID	Site Name	Developable Area, ha	Type	Use Class B	Market Score	Sustainability Score
Top Tier and Available						
MEHA1	Manor Park II	15.32	Greenfield	8	✓	
MEHA13	North of Hale Bank Road	22.80	Greenfield	1.2.8	✓	
MEHA3	Plots 4&5, Daresbury Park	7.64	Greenfield	1	✓	✓
MEHA4	Land North of Jct11, M56	29.65	Greenfield	2	✓	✓
MEHA5	Manor Park III	10.46	Greenfield	8	✓	
MESE1	Former Peerless Refinery	6.80	Brownfield	1.2.8	✓	
MESE3	Senate Business Park/Girobank	5.80	Greenfield	1.2.8	✓	
MESE5	Former Vesty Site	7.40	Brownfield	1.2.8	✓	

ID	Site Name	Developable Area, ha	Type	Use Class B	Market Score	Sustainability Score
MESE6	Former Parcel Force Site	9.50	Brownfield	1.2.8	✓	
LAWL1	XL Business Park	13.18	Greenfield	8		✓
LAWL2	Whitemoss Business Park	7.35	Greenfield	1		✓
MEHA6	Shell Green	6.02	Greenfield	1		✓
MEHA7	Shell Green	5.95	Greenfield	1		✓
MEHA8	Johnsons Lane	8.66	Greenfield	1		✓
MEHA9	Ex Sleeper Depot	17.24	Brownfield	1		✓
MEHA10	Weston Point Docks	7.75	Brownfield	1		✓
MEHA11	Ineos Chlor Weston Point	12.48	Brownfield	2		✓
MEHA12	Ditton Rail Freight Site 1	45.70	Brownfield	1.2.8		✓
MESE2	Atlantic Park	18.20	Brownfield	1.2.8		✓
Top Tier and Unavailable						
MEKN6	Prescot – BICC Site C	8.80	Brownfield	1.2.8		✓

Source: North West Employment Land Study 2005

A4.7 A further 13 sites are described as being of average quality and available. None of these fall into both the Market and Sustainability Score rankings. Sites are included from all areas except Knowsley. Halton again dominates.

A4.8 Of the study area's 7 sites that are included in the average quality, but unavailable in three years category, five are in Knowsley. Sefton and West Lancashire each have one site. Halton has none. Table A4.2 details the average quality sites.

Table A4.2 – Halton, Knowsley, Sefton and West Lancashire Employment Sites. Availability and Deliverability – Average Quality Sites

ID	Site Name	Developable Area, ha	Type	Use Class B	Market Score	Sustainability Score
Middle Tier and Available						
LAWL1	XL Business Park	13.18	Greenfield	8	✓	
LAWL2	Whitemoss Business Park	7.35	Greenfield	1	✓	
MEHA12	Ditton SRF Site 1	4.57	Brownfield	1.28	✓	
MEHA6	Shell Green	6.02	Greenfield	1	✓	
MEHA7	Shell Green	5.95	Greenfield	1	✓	
MEHA9	Ex Sleeper Depot	17.24	Brownfield	1	✓	
MEHA10	Weston Point Docks	7.75	Brownfield	1	✓	
MEHA11	Ineos Chlor Weston Point	12.48	Brownfield	2	✓	
MESE2	Atlantic Park	18.20	Brownfield	1.2.8	✓	
MEHA5	Manor Park III	10.46	Greenfield	8		✓
MESE1	Former Peerless	6.80	Brownfield	1.2.8		✓

ID	Site Name	Developable Area, ha	Type	Use Class B	Market Score	Sustainability Score
	Refinery					
MESE5	Former Vestey Site	7.40	Brownfield	1.2.8		✓
MESE6	Former Parcelforce Site	9.50	Brownfield	1.2.8		✓
Middle Tier and Unavailable						
MEKN1	Roscoe's Wood	7.90	Greenfield	Mixed		✓
MEKN2	Ex Petrolite & Albright & Wilson	18.50	Brownfield	1.2.8		✓
MEKN3	Briton Plantation	6.60	Greenfield	1.2.8		✓
MEKN5	Ford Expansion Land	18.50	Greenfield	2		✓
MEKN7	Kings Business Park	9.00	Mixed	1	✓	✓
LAWL3	Cobbs Clough	9.82	Greenfield	1		✓
MESE4	Southport Commerce Park & Extension	11.90	Brownfield	1	✓	

Source: North West Employment Land Study, 2005

A4.9 Only four sites are rated as 'poor quality and available'. Three are in Halton; one is in Sefton. None are included in both the Market and Sustainability Scores.

A4.10 Finally 10 sites are analysed as falling within the lower third (poor quality) and unavailable in three years rankings. Three of these sites (two in West Lancashire and one in Knowsley) feature in both the Market and Sustainability Scores. Sites in Knowsley dominate, and only Halton does not have any in this category. The poor quality (lower tier) sites are identified in Table A4.3.

Table A4.3 – Halton, Knowsley, Sefton and West Lancashire Employment Sites. Availability and Deliverability – Lower Third Tier Sites

ID	Site Name	Developable Area, ha	Type	Use Class B	Market Score	Sustainability Score
Lower Tier and Available						
MEHA8	Johnsons Lane	8.66	Greenfield	1	✓	
MEHA1	Manor Park III	15.32	Greenfield	8		✓
MEHA13	North of Hale Bank Road	22.80	Greenfield	1.2.8		✓
MESE3	Senate Business Park/Girobank	5.80	Greenfield	1.2.8		✓
Lower Tier and Unavailable						
LAWL4	Simonswood I	5.02	Greenfield	2	✓	✓
LAWL5	Greaves Hall Business Park	5.21	Brownfield	1	✓	✓
MEKN4	North Perimeter Road/Moss End Way/Depot Road	12.70	Greenfield	1.2.8	✓	✓
MESE4	Southport Commerce Park and Extension	11.90	Brownfield	1		✓
LAWL3	Cobbs Clough	9.82	Greenfield	1	✓	

ID	Site Name	Developable Area, ha	Type	Use Class B	Market Score	Sustainability Score
MEKN1	Roscoe's Wood	7.90	Greenfield	Mixed	✓	
MEKN2	Ex Petrolite/Albright & Wilson	18.50	Brownfield	1.2.8	✓	
MEKN3	Briton Plantation	6.60	Greenfield	1.2.8	✓	
MEKN5	Ford Expansion Land	18.50	Greenfield	2	✓	
MEKN6	Prescot – BICC Site C	8.80	Brownfield	1.2.8	✓	

Source: North West Employment Land Study, 2005

A4.11 The tables reveal that only six of the 30 sites demonstrated correlation between their ranking for 'Market' and 'Sustainability'. And half of these fall into the poor quality and unavailable assessment.

A4.12 In general the land supply within the study area is considered to be of average or poor quality. In 'Market' terms only 30 percent of the sites (around 35 percent of the land supply figure of 330.72 ha) was seen as quality and available supply. This assessment must be quantified by the fact that only sites in excess of 5 ha were reviewed.

A4.13 Of the quality and available land, over 75 percent comprised sites in Halton (all but one of these being in Runcorn). Sefton was the only other local authority area to have such sites. For Knowsley the supply position was particularly challenging with all but one of the borough's seven sites being classed, in 'Market' terms, as of poor quality and unavailable within three years.

North West Ports: Economic Trends and Land Use Study (NWDA, 2005)

A4.14 The study provides an assessment of the economic trends affecting North West ports, and how this translates into port land use requirements. It comments on the ports located within Sefton and Halton, namely the Port of Liverpool (Seaforth) and the Manchester Ship Canal ports at Runcorn and Weston Point.

A4.15 With regard to the Port of Liverpool (which is split between locations in Liverpool City and Sefton), the study states that given current market and policy trends, its future roles are likely to be:

- A major deep sea 'gateway' port for the region and Great Britain, handling the full range of deep sea traffic
- The most centrally located west coast deep sea container port able to accommodate post-panamax vessels, handling both direct calls by deep sea vessels, transshipment traffic to Ireland and traffic fed from other UK and Continental deep sea container ports
- The major Irish Sea RoRo (roll-on, roll-off) port in the North West region, following the development of the riverside terminal
- A major sustainable distribution hub (waterborne, rail and road freight transport) servicing a national hinterland, with associated warehousing.
- By 2025 land availability will have become a constraint to the port's development. And enhancements are likely to be required to both road and rail access to cater for the increased volumes of traffic. The latter would address identified constraints of congestion on the A5036 (port access road) and loading gauge limitations on the Bootle branchline.

A4.16 One identified opportunity is the development of major multi-modal distribution activity, based on the port estate (freight village concept with the expansion of LIFT

– much of which is located in Sefton) with good road, rail and maritime links and warehousing, to serve both the North West and Irish markets.

North West Competitiveness and Operational Programme 2007-2013 (NWDA, 2007)

- A4.17 Over the period 2007-2013, the North West is set to receive just over €750 million in ERDF support under the Competitiveness strand of the European Union's Structural Funds. Out of this total, 41 percent is ring fenced for Merseyside. In response to this opportunity, partners in the region have developed a North West Operational Programme (NWOP) to determine how these resources are to be used.
- A4.18 The report provides an overview of the North West economy. Greater Merseyside has a GVA of £16.1 billion, 19 percent of the regional total, and was historically dominated by port and port-related service activities. It has a population of 1.5 million. Now the sub-region has concentrations in chemicals and public sector administration, and a developing services sector. Liverpool is the major city and has 447,000 residents. The most significant features are the importance of the public sector to GVA, the low importance of manufacturing and the significance of financial and business services overall. In relative terms Greater Merseyside has an above regional average concentration of GVA and employment in the financial services sector, but its shares of GVA in business services are similar to the regional average and its employment share is lower.

Table A4.4 – Key Economic Indicators

	Greater Merseyside	North West
Population (000s, 2004)	1485.9	6846.3
Population density (2004)	1637	459
Population change (1999 – 2004)	-0.9 percent	0.8 percent
GVA, £billion (2003)	16.2	97.1
Average annual GVA growth (1998-2003) - current prices	5.1 percent	4.6 percent
GVA per head (2003)	£11,846	£14,269
Relative GVA per head, England = 100 (2003)	72	86
No. of firms (000s, 2004)	39.8	232.9
Employment (000s, 2004)	589.5	3014.9
Average annual employment growth (1999-2004)	1.6 percent	1.6 percent
Economic activity rate (2005)	73.4 percent	76.6 percent
Unemployment rate (2005)	4.8 percent	4.7 percent

Source: North West Competitiveness and Operational Programme, 2007

- A4.19 The North West has a relatively small business base given the size of its economy. Business density, as measured by the number of VAT registered businesses per 10,000 working age adults, is 18 percent below the average for England, and indeed the region has the lowest business density of any English region after the North East. To reach the national average rate of business density in 2004, the region would need an additional 37,800 VAT registered businesses, and despite an increase in the business stock, this gap has increased over the past five years. In this period, the sectors that have grown their business stock have been financial

intermediation, business services and hotels and restaurants. Agriculture, manufacturing and mining, electricity, gas and water supply have all seen falls.

Table A4.5 – Size Breakdown of Firms

Area	Proportion, percent			
	1-10 Employees	11-49 Employees	50-199 Employees	200 or more employees
Greater Merseyside	78.5	16.4	4.2	0.9
North West	81.2	14.4	3.5	0.8
England	83.7	12.5	3.0	0.7

Source: North West Competitiveness and Operational Programme, 2007

- A4.20 Greater Merseyside is some way behind the rest of the region, trailing the national per capita average for business density and business start-up rate by some 40 percent. Self-employment rates are also low compared to national levels. Survey evidence suggests that there are prevailing negative attitudes to enterprise in Greater Merseyside. The proportion of respondents, who believe that entrepreneurs have high status, and that there is good media coverage of entrepreneurship, is lower than both the national and regional averages. Also, compared to the rest of the region, Greater Merseyside residents are less likely to see setting up a business as a good career choice.
- A4.21 There is limited data on innovation at the sub-regional level, but trends tend to be correlated with rates of enterprise and GVA per employee. There is evidence of considerable variation in levels of innovation in the North West. There is a strong concentration of higher education institutes (HEI) assets and a good base of knowledge-intensive businesses in Greater Manchester and Greater Merseyside (concentrated in the city centres).
- A4.22 Greater Merseyside has a concentration in chemicals (RES target sector), tourism and public sector administration, and an important maritime sector (which cuts across a number of SICs).
- A4.23 Greater Manchester and Greater Merseyside have enjoyed the majority of business investment (indigenous and inward investment) in recent years. Within these sub-regions, the core cities of Manchester and Liverpool have performed the best overall. With continued growth in the service sector, and tradeable business services in particular, these areas will continue to be a key pole for business investment.
- A4.24 The North West's portfolio of strategic regional sites is a vital resource in the region's efforts to maximise both employment and wealth. There are 25 strategic regional sites in the North West, which have an important role to play in attracting investment in high value functions in target sectors. They also provide an opportunity to capitalise on strong or world-class assets such as HEIs and R&D-intensive sectors. The sites have been earmarked based on the potential to accommodate knowledge-based industry (RES growth target sectors) and generic manufacturing (RES established target sectors).
- A4.25 Demand for property is highest in and around the major conurbations although demand is growing strongly in Warrington, Halton, other parts of Cheshire and parts of Lancashire, where access to major transport routes is good. Changing patterns of employment and economic activity by sector are being reflected in changing sectoral and spatial demand for different types of business property. This ongoing

industrial change means that the region's already large stock of previously developed land (PDL) (i.e. brownfield sites) is likely to increase. Redeveloping PDL is particularly challenging for the North West as it is largely concentrated in areas where demand is weak and where the costs associated with recycling land are high. Greater Merseyside's industrial legacy in particular has left it with a high proportion of derelict land.

Table A4.6 – Greater Merseyside SWOT Analysis

Strengths & Opportunities	Weaknesses & Threats
Critical mass of culture, sporting, heritage, leisure, natural environment and retail assets	Per capita GVA remains well below the England average and the lowest of all the sub-regions
Seaboard location and role as the gateway for trade and people into the North West, North Wales and North of England; important maritime sector	
Liverpool John Lennon Airport is one of the fastest growing in the UK in recent years	Economic activity rates in Greater Merseyside are lower than in any other metropolitan area
Premier business locations including Liverpool city centre, Wirral Docklands, Parkside, Prescot Business Park, Atlantic Gateway and Widnes Waterfront	Despite economic growth experienced in Liverpool, deprivation and worklessness remain high
Greater Merseyside is one of the fastest growing regions in the UK in recent years. Liverpool has performed particularly well in job creation terms	Greater Merseyside business density and start-up rate is well behind the UK and North West figures – total entrepreneurial activity is low and entrepreneurial skills are under-developed
An excellent HE and FE sector	Deficiency in skilled and highly qualified people – skill levels lower than in the region and UK as a whole, particularly among younger people
The gap on national employment rates is being closed, and at current growth rates should equal the UK in less than a decade	Industrial legacy has left Greater Merseyside with high proportion of derelict land
Internationally and nationally significant clusters	Deprivation levels in parts of the sub-region are among the highest in the UK – Liverpool is ranked first and Knowsley third on the indices of deprivation
Capital of Culture 2008 provides an opportunity for the whole region and a spur to creative industries and the arts in Greater Merseyside	
Construction of the Mersey Gateway will enhance Greater Merseyside's connectivity to national markets	
Opportunities related to the strength of the third sector	

Source: *North West Competitiveness and Operational Programme, 2007*

A4.26 The ERDF should primarily focus on the three following priorities:

- Innovation and the knowledge economy
- Environment and risk prevention
- Access to transport and telecommunication services of general economic interest.

A4.27 The structure of the NWOP is summarised in Table A4.7 below.

Table A4.7 – Outline of NWOP Framework

RES: Vision – A dynamic, sustainable international economy which competes on the basis of knowledge, advanced technology and an excellent quality of life for all							
Improving productivity and growing the market		Creating the conditions for sustainable growth		Growing and accessing employment			
Priority 1 – Stimulating enterprise and supporting growth in target sectors and markets		Priority 2 – Exploiting innovation and knowledge		Priority 3 – Creating the conditions for sustainable growth		Priority 4 – Growing and accessing employment	
AA1-1 Developing high-value new enterprise		AA2-1 Exploiting the science and R&D base of the region		AA3-1 Exploiting the economic potential of major gateways in Merseyside		AA4-1 Stimulate enterprise in disadvantaged communities and under-represented groups	
AA1-2 Developing higher added-value activity in target regional sectors		AA2-2 Encouraging innovation to improve productivity in all companies		AA3-2 Developing high quality sites and premises of regional importance		AA4-2 Supporting linkages to key employment areas	
AA1-3 Increasing sustainable consumption and production		AA2-3 Developing better management and leadership		AA3-3 Supporting the improvement of the region's visitor offer and image		AA4-3 Supporting employment creation for areas of regeneration need	

Source: North West Competitiveness and Operational Programme, 2007

Regional Economic Forecasting Panel : Business Forecasts North West (NWRU 2008)

- A4.28 The Spring 2008 report reflects the impact of the credit crunch as foreseen at that time. The North West economy is forecast still to grow, but by 1.7 percent in 2008 – a sharp drop from the 2.6 percent achieved in 2007. It will be 2011 before strong growth occurs again.
- A4.29 The North West will be sheltered during the downturn but by a lesser margin than expected shortly after the credit crisis began. In the recovery period, and consistent with long terms trends, North West economic growth is likely to be slower than in the UK as a whole.
- A4.30 Growth in 2008 will be strongest in Cheshire and Greater Manchester, and weakest in Lancashire. GVA growth forecasts for Merseyside are set out in Table A4.8. All industry sectors except government and other services will experience slower growth. The sharpest slowdown will be in financial and business services (though it will still be the fastest growing sector). Total jobs growth will slow to 0.2 percent in 2008, falling by the same amount next year due to losses in manufacturing, construction and distribution sectors.

Table A4.8 – Real GVA Growth (percentage per annum)

	2008	2009	2010	2011
North West	1.7	1.5	2.2	2.9

	2008	2009	2010	2011
Merseyside	1.6	1.4	2.0	2.7

Source: NWRIU/Cambridge Econometrics, 2008

Strategic Regional Sites Evidence Base (NWDA 2005)

- A4.31 This report sets out the evidence base for the North West's strategic regional sites. It provides general and site specific objectives for each site, and discusses some emerging issues, and their implications for the preparation of the RSS.
- A4.32 The term strategic regional site is used by the NWDA to describe 25 key employment sites, the delivery of which will be critical to the effective implementation of the RES.
- A4.33 Of the 25 Strategic Regional Sites identified by the NWDA, three are within the study area. These are:
- Daresbury Park, Runcorn
 - Kings Business Park, Knowsley
 - Ditton, Widnes.
- A4.34 Details of each site, its primary economic target, vision and objectives, and policy alignment with Regional Planning Guidance are set out in the following table.

Table A4.9 – Strategic Regional Sites Policy Alignment

Site Name/Primary Economic Target	Vision and Objectives	RPG Policy Alignment
Ditton, Widnes Inter modal rail freight facility	Development is intended to create a modern intermodal exchange, logistics and strategic rail freight facility. The site will; <ul style="list-style-type: none"> • Accommodate strategic distribution development • Accommodate businesses that will utilise the railway for transportation of freight; • Provide a significant number of jobs for local people 	EC6 The Regeneration Challenge: Economic Growth to Areas of Acute Needs EC7 Warehousing and Distribution T7 Freight Transport In Metropolitan RPA and RPG
Kings Business Park, Knowsley Growth Target Sectors	Create a high quality employment site in Merseyside primarily for knowledge based industry growth target sectors. <ul style="list-style-type: none"> • Facilitate attraction of high quality businesses to a borough which is under represented in growth target sector of knowledge based industries; • Attract growth target sectors of environmental technologies, life science industries, medical equipment and technology, financial and professional services, tourism, computer software and services and creative industries. 	EC3 Knowledge Based Industry EC5 Regional Investment Sites EC6 The Regeneration Challenge: Economic Growth to Areas of Acute Needs In Metropolitan RPA and RPG
Cont...		

Site Name/Primary Economic Target	Vision and Objectives	RPG Policy Alignment
<p>Daresbury Park, Runcorn</p> <p>Growth Target Sectors</p>	<p>Provides high quality, knowledge based flagship development to attract both inward investors and indigenous business and to grow new science based businesses capitalising on Daresbury Laboratory providing the opportunity to tackle high levels of deprivation in adjoining areas.</p> <ul style="list-style-type: none"> • Build on the role of the Daresbury Laboratory complex as a centre for national research and encourage wider participation on the site by research universities; • Accommodate the needs of knowledge based businesses, with particular emphasis on growth target sectors of environmental technologies, life science industries (biotechnology and pharmaceuticals), medical equipment and technology and computer software and services; • Form an essential ingredient of the partnership working between the NWDA and the Central Laboratory of the Research Councils (CLRC) which will seek to exploit the major research facilities at Daresbury Laboratory and promote and grow the subsequent commercial opportunities; • Provide for local employment needs within a high quality business park location, to assist in addressing the regionally significant deprivation problems in Halton and adjoining areas. 	<p>EC3 Knowledge Based Industry</p> <p>EC4 Business Clusters</p> <p>EC5 Regional Investment Sites</p> <p>EC6 The Regeneration Challenge: Economic Growth to Areas of Acute Needs</p> <p>Within Metropolitan RPA</p>

Source: NWDA Strategic Regional Sites Evidence Base, 2005

NWDA Strategic Regional Sites Annual Monitoring Report 2006

A4.35 The Strategic Regional Sites Annual Monitoring Report provides a summary of recent progress within the 25 strategic regional sites. The 2006 Report is the latest available document.

A4.36 Outlined below is a summary of progress on the three sites contained in this report:

Table A4.10 – Strategic Regional Sites Annual Monitoring – Progress

Site Name	Vision and Progress	Location and Planning Context
<p>Ditton, Widnes</p>	<p><u>Vision</u> Development is intended to create a modern inter-modal exchange, logistics and strategic rail freight facility. The Strategic regional site will;</p> <ul style="list-style-type: none"> • Accommodate strategic distribution development • Accommodate businesses that will utilise the railway for transportation of freight • Provide a significant number of jobs for local people <p><u>Progress</u></p> <ul style="list-style-type: none"> • Private sector led consortium is developing proposals for the Ditton Strategic Rail Freight Park • Masterplan has been commissioned by Halton Borough Council to set context for the sites subsequent development – parts of the site will require significant investigation and clean-up • Halton Borough Council has recently launched a new branding for the Freight Park – ‘3MG’ – The Mersey Modal Gateway, and produced a publicity brochure. 	<ul style="list-style-type: none"> • 183 ha site • UDP envisages phased development of 200,000 sqm of rail served buildings potentially rising to 400,000 sqm • March 2005, planning permission was submitted for Strategic Rail Freight Park • Draft SPD for DSRFP was issued for public consultation in 2005.
<p>Kings Business Park, Knowsley</p> <p>Growth Target Sectors</p>	<p><u>Vision</u> To create a high quality employment site in Merseyside primarily for knowledge based industry growth target sectors.</p> <ul style="list-style-type: none"> • Facilitate attraction of high quality businesses to a borough which is under represented in growth target sector of knowledge based industries; • Attract growth target sectors of environmental technologies, life science industries, medical equipment and technology, financial and professional services, tourism, computer software and services and creative industries. <p><u>Progress</u></p> <ul style="list-style-type: none"> • Funding support by NWDA facilitated the development of 3,525 sqm B1 office on Kings Business Park which was occupied by Vertex in 2003 creating more than 200 new jobs. • In July 2004 Computer Science Corporation opened a new office development on the business park with support from NWDA. 	<ul style="list-style-type: none"> • 20 ha site, 3 ha of which remains undeveloped • 9 remaining developable hectares to be developed for B1 and B2 use • Outline planning permission for the above already in place • All site infrastructure works completed.
<p>Cont...</p>		

Site Name	Vision and Progress	Location and Planning Context
<p>Daresbury Park, Runcorn</p>	<p><u>Vision</u></p> <p>To provide high quality, knowledge based flagship development to attract both inward investors and indigenous business and to grow new science based businesses capitalising on Daresbury Laboratory providing the opportunity to tackle high levels of deprivation in adjoining areas.</p> <ul style="list-style-type: none"> • Build on the role of the Daresbury laboratory complex as a centre for national research and encourage wider participation on the site by research universities • Accommodate the needs of knowledge based businesses, with particular emphasis on growth target sectors of environmental technologies, life science industries (biotechnology and pharmaceuticals), medical equipment and technology and computer software and services • Form an essential ingredient of the partnership working between the NWDA and the Central Laboratory of the Research Councils (CLRC) which will seek to exploit the major research facilities at Daresbury Laboratory and promote and grow the subsequent commercial opportunities • Provide for local employment needs within a high quality business park location, to assist in addressing the regionally significant deprivation problems in Halton and adjoining areas. <p><u>Progress</u></p> <ul style="list-style-type: none"> • The majority of the Daresbury Business Park site has outline planning permission for offices and research and development use • In December 2005 full planning permission was granted for an office village on the site (5,575 sqm of floorspace) • Daresbury Business Park is a private sector joint venture between Maple Grove Developments and De Vere Group PLC • NWDA is investing £50m with partners to take forward the establishment of the Daresbury Science and Innovation Campus • Daresbury Laboratory lies in the centre of the Science and Innovation Campus. 	<ul style="list-style-type: none"> • Policy E1 of Halton UDP has earmarked the 9 ha of land that has been developed along with another 42 ha of land adjoining the existing Daresbury Business Park for Employment Growth Sectors • Policy E1 of Halton UDP allocates 4 sites adjacent to the Daresbury Laboratory complex, which in total make 13.6 ha of land that will comprise the Daresbury Science and Innovation Campus.

Source: NWDA Strategic Regional Sites Annual Monitoring Report, 2006

RSS Annual Monitoring Report for the North West of England (4NW, 2007)

- A4.37 This is the fourth Annual Monitoring Report produced by 4NW. It monitors policies contained within the RSS for the North West (RPG13).
- A4.38 With regards to economic growth, just over 1.4 million sqm of floorspace was developed for industrial and/or commercial use between 2005 and 2006. This figure was a considerable uplift on the previous year's figure of just under 836,000 sqm.
- A4.39 Between 2005 and 2006 just under 90 percent of all the development took place on previously developed land, representing a 12.5 percent rise on the previous year. Fourteen local authorities achieved 100 percent of the development on previously developed land. These included Knowsley and Sefton.
- A4.40 The 2005/06 data from the North West local planning authorities showed there was a total of almost 5000 ha of employment land available in the region. A quarter of the region's available land is in Merseyside, with Halton, Knowsley and Sefton collectively contributing 472 ha (39 percent) of the sub-regional total. Including West Lancashire the total supply is 534 ha.
- A4.41 The individual local authority figures are:
- Halton 247.78 ha
 - Knowsley 139.59 ha
 - Sefton 84.90 ha
 - West Lancashire 62.14 ha.

Merseyside Economic Review (The Mersey Partnership 2007)

- A4.42 This is the fifth edition of the Merseyside Economic Review. The report provides a review of Merseyside (including Halton, Knowsley and Sefton) under the following themes:
- Economy
 - Employment
 - Business
 - People and skills
 - Transport
 - Environment
 - Business environment
 - Society.
- A4.43 With regards to the economy, the review states the following:
- Total GVA growth on Merseyside has kept pace with the UK as a whole, whilst GVA per head has grown at a rate higher than the regional and national averages. The data released in 2006 by the ONS provides data for 2004. This shows that the total GVA for Merseyside in 2004 was £17 billion, compared to £16.1 billion in 2003. This represents a growth of some 5.6 percent, which is comparable to the North West figure of 5.7 percent and only slightly behind an average UK growth rate of 5.9 percent
 - Although total GVA implies a stable growth the results per person are more dynamic: a strong Merseyside GVA is reflected in a per capita GVA for the sub-region that has grown by 5.5 percent from 2003 (from £11,798 to £12,448). This is on a par with the UK growth rate and marginally higher than the North West average (5.4 percent)
 - For GVA at the local level, Sefton recorded the second highest growth rate in Merseyside (5.6 percent), closely followed by Knowsley (combined with St Helens) and Halton (combined with Warrington) at 5.5 percent

- Highest growth in Merseyside's total GVA between 1995 and 2004 was in the hotel and restaurant sector (increase of 144 percent), financial intermediation (increase of 100 percent) and real estate and business services (increase of 94 percent).
- A4.44 With regards to employment, the review states the following:
- The proportion of the Merseyside working age population in employment increased from 68.1 percent to 68.2 percent in between 2004 and 2005
 - Whilst Halton and Knowsley saw increased employment rates between 2004 and 2005, Sefton's fell by 1.9 percent – the worst of any Merseyside district
 - Self-employment in Merseyside is now 6.5 percent of the working age population, although for Sefton the figure is 7.5 percent
 - 2006 economic activity rates show Halton (74.5 percent) and Sefton (75.9 percent) exceeding the Merseyside average of 73.1 percent. Knowsley has the second lowest rate, at 72.6 percent.
- A4.45 With regards to business, the review provides the following information:
- Merseyside has 26,655 businesses registered for VAT, representing a 2.3 percent increase since 2005
 - At the start of 2006, Merseyside had a business density of 22.0 VAT businesses per 1000 adult population, somewhat lower than the North West (32.1) and UK (38.1).
- A4.46 With regards to the business environment, the review provides the following information:
- Since 1998, property vacancy rates in Liverpool have significantly declined from 16 percent in 1998 to 11 percent in 2005. Knowsley saw property vacancy rates decline by 1 percent from 2004. However both Halton and Sefton saw 1 percent increases.

The Maritime Sector on Merseyside – Economic Impact Study (Mersey Maritime, 2007)

- A4.47 This report identifies the contribution of the maritime sector to the Merseyside economy. The contribution is based on the direct, indirect and induced economic impacts. The maritime sector includes:
- Building
 - Repair and maintenance of ships
 - Cargo handling
 - Education
 - Training and skills
 - Engineering and fabrication services
 - Other specialist sectors
 - Port operations
 - Professional services
 - Royal Navy
 - Shipping
 - Freight and forwarding agents and brokers
 - Storage and warehousing
 - Transport by land and air
 - Transport by sea
 - Wholesale distribution.

A4.48 The study identified just over 1000 businesses in the maritime sector in Merseyside. The largest concentrations of maritime-related businesses are in Liverpool, Sefton and Wirral. The report measured economic impact in four ways:

- Economic output
- Value added
- Employment
- Household income.

A4.49 Tables A4.11 and A4.12 shows the relationship between the maritime sector and the number of employees and GVA in the sub-region. Table A4.11 shows that of all maritime-based jobs in the Merseyside sub-region, 18 percent are in Sefton, Halton and Knowsley collectively represent another 7 percent.

Table A4.11 – Employment by Area

Area	Direct Impact	Indirect/Induced Impact	Total Employment
Halton	876	251	1127
Knowsley	691	194	885
Liverpool	9469	2729	12,198
Sefton	3754	1075	4829
Wirral	2951	843	3794
St Helens and non local	2801	806	3607
Total	20,542	5898	26,440

Source: Maritime Sector on Merseyside – Economic Impact Study, 2007

Table A4.12 – GVA by Local Authority (£'000)

Local Area	Direct Impact	Indirect/Induced Impact	Total Employment
Halton	30,646	8777	39,423
Knowsley	23,501	6710	30,211
Liverpool	314,517	90,793	405,310
Sefton	189,016	54,104	243,121
Wirral	76,287	21,113	97,400
St Helens and non local	76,005	21,995	97,960
Total	709,972	203,451	913,424

Source: Maritime Sector on Merseyside – Economic Impact Study, 2007

Mersey Belt Study (NWDA, 2002)

A4.50 The main objectives of the Mersey Belt Study were to promote an integrated approach to the future planning and investment in the regional target industry sectors, in two broad geographic areas: north of the Mersey (the Metropolitan Axis) and south of the Mersey (the Southern Crescent). Consequently Knowsley and Sefton are identified in the Metropolitan Axis, as is the Widnes area of Halton. Runcorn and other areas of Halton, south of the Mersey, are set within the Southern Crescent.

A4.51 The study considered the concentrations, at local authority area, of five target industry sectors. The assessments for Halton, Knowsley and Sefton are outlined in Table A4.13.

Table A4.13 – Target Industry Sector Concentrations

AREA	Environmental Technologies	Life Sciences	Finance & Professional	Computing & Software	Creative & Media
Halton	Above average	Above average	Below average to average	Above average	Below average to average
Knowsley	Well below average	Well below average	Well below average	Well below average	Well below average
Sefton	Well below average	Well below average	Above average	Above average	Well below average

Source: Mersey Belt Study, 2002

A4.52 The main issues identified in the Metropolitan Axis include securing regeneration; investing in a physical environment, which is often degraded; and building on major assets which include:

- Two major city centres
- Major infrastructure for the arts, sports and culture
- Well developed rail and bus networks
- Several leading universities
- Highly developed road and motorway networks
- Substantial capacity especially in land supply
- A major international port.

A4.53 The Mersey Belt study identified 40 key sites as being suitable for knowledge-based industries. Ten were classified a 'Category A' in which public investment needs to be made, to improve accessibility, infrastructure and image. The remaining 30 'Category B' sites generally have a lower need for public investment.

A4.54 The following recommendations are made for employment land in the Metropolitan Axis:

- Recognise that only a relatively small number of key sites (defined in the study) should be reserved for/promoted for the target sectors, in order to concentrate resources
- For the best sites, define this use in a similar way to the Southern Crescent sites
- Concentrate these sites on regional strategic corridors
- Recognise that strategic corridors physically linked to the Southern Crescent or existing knowledge-based industry locations will be easier to establish than satellites which 'jump' into new areas
- Ensure that each site for knowledge-based industry has a local employment strategy linking its employment potential to areas of need – in terms of public transport, education, training and jobs
- For other sites, permit, but do not promote, target sector development on those defined as of medium suitability for knowledge-based industry
- Whilst recognising that employment land is required for many other industrial uses other than the target sectors, also recognise that there appears to be excess employment land and that some of it might be better converted to residential use for quality homes for knowledge-based workers, thus cutting down journeys-to-work and leading to a more sustainable development pattern

- Promote transport schemes that will improve the sustainability of sites including:
 - Strategic rail and light rail links and new stations/halts
 - Company/site travel plans.

Merseyside Employment Land Study (NWDA, 2004)

A4.55 The study is of relevance to Halton, Knowsley and Sefton. At the macro level, the report highlights the following future trends:

- The continuation of slow but steady economic growth in the UK
- That the booms and busts of the past 20 years are unlikely to be so pronounced in future
- A question mark over the UK's ability to maintain its share of inward investment in Europe and the total size of the likely European inward investment market
- A continuing shift from manufacturing to service sector jobs and knowledge based industries
- Well qualified, highly skilled white collar workers are still favoured over lower skilled workers
- Education and health sectors on the way up, along with selected areas of business services
- Self-employment to rise along with small business formation
- Some continuing relocation away from London and the South East but the scale of this will depend on speed of economic growth.

A4.56 At a micro level, it is evident that Greater Merseyside's previous reliance on the manufacturing industry has more than likely suppressed economic growth.

A4.57 The report identified 1208 ha of employment land across the sub-region, with 35 percent of this supply delivered by Halton, Knowsley and Sefton. The supply estimates, and average take-up rate for each area is shown in Table A4.14. It also shows the forward land supply based on historic take-up.

Table A4.14 –Land Supply Estimates for Greater Merseyside

District	Employment Land Supply, ha	Average Annual Take-up Rate, ha	Number of Years Forward Supply
Halton	189.09	18.61	10
Knowsley	145.13	13.65	11
Liverpool	332.93	8.18	41
Sefton	89.8	5.04	18
St Helens	205.47	9.78	21
Wirral	246.05	10.66	23

Source: Merseyside Employment Land Study, 2004

A4.58 Table A4.15 shows the supply estimates for each area after excluding all sites assessed as being of poor quality.

Table A4.15 – Land Supply Estimates for Greater Merseyside Excluding Poor Quality Sites

District	Employment Land Supply, ha	Average Annual Take-up Rate, ha	Number of Years Forward Supply
Halton	189.30	18.61	10

District	Employment Land Supply, ha	Average Annual Take-up Rate, ha	Number of Years Forward Supply
Knowsley	127.84	13.65	9
Liverpool	178.24	8.18	22
Sefton	61.4	5.04	12
St Helens	132.26	9.78	14
Wirral	152.35	10.66	14

Source: Merseyside Employment Land Study, 2004

- A4.59 Over an 11 year period to 2003-2004, some 702 ha of land was taken up for employment uses in Greater Merseyside. This equates to a sub-regional district average of 10.36 ha/pa. The largest share was in Halton (18.61 ha/pa), with Sefton having the smallest (just 5.04 ha/pa), equating to below half the district average. Knowsley was the second best performing area, with an above average figure of 13.65 ha/pa.
- A4.60 The report comments on the employment structure, with information sourced from the Annual Business Inquiry Employee Analysis, 2002. Key findings were:
- Knowsley has the highest percentage of manufacturing sector employees in the sub-region. The percentage (26 percent) is double the national average, and substantially higher than the North West's 15 percent rate. In stark contrast to elsewhere the actual number of jobs remains relatively constant
 - Halton's manufacturing sector is in decline, but still represents 20 percent
 - Sefton has only 8 percent of its workforce in the manufacturing sector
 - Service sector accounts for 58 percent of Sefton's workforce. This is higher than the North West average of 48 percent. Both Halton (42 percent) and Knowsley (45 percent) are below the regional average.
- A4.61 Comparison of the existing workforce and future employment land figures show a significant disparity in Sefton. It has the lowest proportion of the sub-regional employment land supply (8 percent) compared with the second highest share of workers (18 percent). Halton is the converse, with 14 percent of the land and only 9 percent of the workforce. This may be due to the extent of the 'space hungry' B8 (distribution) uses in the borough.
- A4.62 The report's analysis of existing employment floorspace (sourced from ODPM figures, 2003) shows that Knowsley had the most factory floorspace (1.466 million sqm). This reflects the success of Knowsley Industrial and Business Parks. Yet Knowsley also had the least amount of office floorspace – at 99,000 sqm this is only about 9 percent of the space in Liverpool.
- A4.63 Details of provision in the three boroughs are summarised in Table A4.16.

**Table A4.16 – Employment Use Floorspace in Greater Merseyside 2003
Halton, Knowsley, Sefton Summaries**

Local Authority	Comments
Halton	<ul style="list-style-type: none"> • Second lowest total floorspace figure • Only Liverpool and St Helens had more warehouse space • Factory floorspace figure exceeds only Sefton's • Second largest average warehouse size and third largest average factory size

Local Authority	Comments
	<ul style="list-style-type: none"> • Largest average office size
Knowsley	<ul style="list-style-type: none"> • Highest amount of manufacturing floorspace • Lowest amount of office floorspace • Only Sefton and Wirral had less warehousing space • Largest average factory and warehouse units • Second smallest average office size
Sefton	<ul style="list-style-type: none"> • Lowest level of total floorspace • Second highest amount of office floorspace • Factory and warehouse floorspace totals are the lowest in Greater Merseyside • Lowest average factory size • Second lowest average warehouse size

Source: Merseyside Employment Land Study, 2004

A4.64 Brownfield land dominates the employment land supply in Sefton (91 percent) and Knowsley (58 percent). However, Halton has the largest amount of greenfield sites of any Greater Merseyside district (73 percent of its overall supply).

A4.65 The report comments on the distribution of land by the number of large sites (above 5 ha), as this has implications for the type of employers that can be attracted. The position is set out in Table A4.17.

Table A4.17 – Distribution of Employment Land – Sites Above 5 ha

Location	Total Number of Sites	Number of Sites 5 ha min.	Percentage of Total Supply in 5 ha+ Sites
Halton	61	9	62
Knowsley	57	6	42
Sefton	19	6	77

Source: Merseyside Employment Land Supply, 2004

A4.66 Qualitative assessments of the land supply were provided by the individual local authorities. Halton had the highest level of land judged to be of a high quality. 54 percent of the supply was judged to be very good quality, with 36 percent of good quality. Only one site of 0.06 ha was considered to be poor quality.

A4.67 Knowsley's supply fared less well in its assessment. Only 4 percent was considered to be of very good quality; 32 percent of good quality, with 52 percent of average quality. Around one-eighth of the supply was therefore considered to be poor quality.

A4.68 For Sefton, almost two-thirds of the supply was considered to be very good (10 percent) or good quality (53 percent). 5 percent was judged as average and 13 percent (two sites) was considered poor. Around 18 percent of the supply was not assessed.

Merseyside Joint Waste Development Plan (March 2008)

A4.69 The Joint Waste Development Plan for Merseyside covers six local authority areas, including Halton, Knowsley and Sefton. It seeks to plan for future waste

management facilities, addressing the scale of future waste production; the processes to be used to deal with it; and the number of facilities/sites needed to be provided.

- A4.70 The Plan notes Merseyside already has an extensive waste management infrastructure. Amongst the most significant facilities currently licensed are:
- 8 landfill sites
 - 71 Waste Transfer Stations
 - 25 Waste Treatment Facilities
 - 62 Metal Recycling/Vehicle Dismantling Sites.
- A4.71 Additional facilities forecasted for the period to 2025, to manage the various waste streams, are:
- 7 landfill/landraise sites to accommodate medium scale facilities – 3 to be for Municipal Solid Waste (MSW); 3 for Construction, Demolition and Excavation Waste; 1 for hazardous waste.
 - 2 refuse sorting facilities required for MSW.
 - 5 treatment facilities – 4 for MSW/Commercial & Industrial waste; 1 for hazardous waste
 - 2 composting facilities required for MSW
 - 1 reprocessing and recycling facility.
- A4.72 However the report comments that most of these facilities will actually be required to prior to 2013.
- A4.73 The Employment Land Review brief set a requirement to consider recommending sites within Halton, Knowsley and Sefton that would be suitable to meet the needs of this Plan.
- A4.74 However, due to delays in the production of the JWDP, and consequence implications on the consultation programme, it was agreed this would be excluded from the Joint Employment Land Study. Nevertheless, as this study report was being finalised the JWDP 'Spatial Strategy and Sites Consultation Document' was issued. This identifies:
- Sub-regional site opportunities (minimum size 4.5 ha) 5 of the 10 are in either Halton, Knowsley or Sefton
 - Site opportunities (below 4.5 ha) in Halton (three sites); Knowsley (five sites); Sefton (eight sites)
 - 11 potential landfill/landraise sites within Halton, Knowsley or Sefton, that will be assessed for their suitability.
- A4.75 For completeness of information in the Joint Employment Land Study, where sites are included in the JWDP Spatial Strategy Consultation Document, this is noted on the site proformas.
- Liverpool John Lennon Airport Masterplan (2007)**
- A4.76 The masterplan's vision is to retain John Lennon Airport's position as the airport of choice for North West travellers, complement the Port of Liverpool and contribute to the regeneration and renaissance of Liverpool.
- A4.77 In 2004 the Airport handled 3.4 million passengers and 9200 tonnes of freight, projected to increase to 12.3 million and 220,000 tonnes by 2030. The airport provides direct employment for 3050 people, potentially growing to 9410 by 2030.

- A4.78 The masterplan identifies the contribution of the Airport to the Merseyside economy. The contribution is based on direct and indirect economic impacts to 'air intensive sectors' which depend on air travel to move goods and access customers. Such sectors include:
- Insurance
 - Banking and finance
 - 'Other' business services
 - Transport
 - Communication
 - ICT
 - Precision and optical instruments
 - Research and development
 - Printing and publishing.
- A4.79 The investment of air intensive sectors is focused on Speke-Garston and southern Knowsley. Examples include the £115m Avarto printing works at Liverpool International Business Park, made possible by available air links to Europe.
- A4.80 Masterplan proposals include the development of a new 7 ha cargo handling facility, expansion of the business aviation centre, and a new mixed use development adjacent to Speke Hall Avenue. Within the study area, a proposed Eastern Access Transport Corridor would link the Airport with Speke Boulevard, taking land from both Knowsley and Halton. Proposed runway extensions would also expand airport operations into Halton.
- Liverpool City Region Economic Projections and Prospects (October 2007)**
- A4.81 The study considers the long-term potential for employment and GVA growth in the Liverpool City Region (LCR) and its constituent districts. Halton, Knowsley, Sefton and West Lancashire are therefore all included. It takes into account strategic developments within the LCR that propose to provide around 120,000 direct by 2020.
- A4.82 The planned LCR strategic developments seek to ensure that future economic growth is significantly enhanced. If they deliver in line with expectations, then growth in the LCR will exceed the forecast for the UK and the North West for the next decade.
- A4.83 The report notes that despite the overall scale of the potential jobs, because of the sectoral mix of the jobs to be delivered by the development projects, there is unlikely to be a significant improvement in the overall productivity in the LCR's economy. For this to occur, the nature of activities attracted to the new development sites must be in higher value added activities than are currently undertaken in the LCR. The attraction of high value-added sectoral employment opportunities in sectors such as financial and professional services, ICT and other high technology industries, has therefore to remain a key strategic priority for local partners.
- A4.84 The LCR needs to improve the level, and trend, in value-added jobs, if it is to close the wealth divide with other parts of the UK (and influence the underlying growth rate of the economy). However, the strategic developments are concerned with the physical provision of jobs, not directly improving productivity.
- A4.85 There needs to be a genuine step change in the LCR's performance to attract high value-added inward investment. The high profile projects planned will provide a quality of infrastructure previously lacking. But if they are to truly transform the local economy, then the new employment sites must be occupied by

nationally/internationally competitive firms that create significant numbers of well-paid jobs. And they must invest heavily for the future.

- A4.86 The report provides data on the past economic performance of the LCR, and the city region's individual local authorities. The following tables provide details of growth in employment and Gross Value Added for Halton, Knowsley, Sefton and West Lancashire, as well as the LCR total.

Table A4.18 – Growth in Employment

Area	1981-1994 %pa	1994-2000 %pa	2000-2003 %pa	2003-2005 %pa	2005-2006 %pa
Halton	-0.3	0.8	0.2	4.3	-0.2
Knowsley	-2.5	2.3	1.3	1.4	0.4
Sefton	0.3	2.2	1.1	0.5	0.3
West Lancs.	0.5	0.2	0.5	6.5	-0.1
LCR	-0.6	0.9	1.5	1.8	0.4

Source: Liverpool City Region Economic Projections and Prospects, 2007

Table A4.19 – Growth in Gross Value Added (GVA)

Area	1981-1994 %pa	1994-2000 %pa	2000-2003 %pa	2003-2005 %pa	2005-2006 %pa
Halton	1.9	2.2	0.4	4.3	2.3
Knowsley	0.7	3.4	3.2	3.3	2.1
Sefton	1.9	4.3	0.0	2.1	2.1
West Lancs.	2.6	1.2	1.1	7.1	1.9
LCR	1.5	2.9	1.5	3.7	2.2

Source: Liverpool City Region Economic Projections and Prospects, 2007

- A4.87 The report provides forecasts of employment and population growth to 2020, and details of these are set out, in terms of both numbers and percentages, in the following four tables. Again details are supplied for the four local authorities and the LCR as a whole.

Table A4.20 – Employment Forecasts – Numbers

Area	2000 (000's)	2005 (000's)	2010 (000's)	2015 (000's)	2020 (000's)
Halton	58	63	65	67	70
Knowsley	58	63	64	65	66
Sefton	111	116	119	121	123
West Lancs.	42	48	49	49	50
LCR	1064	1152	1183	1211	1241

Source: Liverpool City Region Economic Projections and Prospects, 2007

Table A4.21 – Employment Forecasts – Percentage Change

Area	1990-2000 %pa	2000-2005 %pa	2005-2010 %pa	2010-2015 %pa	2015-2020 %pa
Halton	-3.2	5.4	1.6	2.5	3.0
Knowsley	-0.1	4.1	1.5	0.9	1.0
Sefton	5.0	5.0	3.0	2.3	2.1
West Lancs.	- 0.5	6.4	0.4	0.6	0.8
LCR	-21.8	87.9	30.6	28.4	29.8

Source: Liverpool City Region Economic Projections and Prospects, 2007

Table A4.22 – Population Forecasts – Numbers

AREA	2000 (000's)	2005 (000's)	2010 (000's)	2015 (000's)	2020 (000's)
Halton	119	119	118	118	118
Knowsley	151	149	148	146	145
Sefton	284	281	278	277	276
West Lancs.	108	110	110	111	112
LCR	2382	2388	2382	2388	2399

Source: Liverpool City Region Economic Projections and Prospects 2007

Table A4.23 – Population Forecasts – Percentage Change

AREA	1990-2000 %pa	2000-2005 %pa	2005-2010 %pa	2010-2015 %pa	2015-2020 %pa
Halton	-0.5	0.0	-0.2	-0.2	-0.2
Knowsley	-0.3	-0.3	-0.2	-0.2	-0.2
Sefton	-0.4	-0.2	-0.2	-0.1	0.0
West Lancs.	-0.1	0.3	0.2	0.1	0.1
LCR	-0.2	0.0	0.0	0.0	0.1

Source: Liverpool City Region Economic Projections and Prospects 2007

A4.88 The report analysed the planned LCR strategic developments. Those located within the four local authority areas are summarised in the following table (Table A4.24).

Table A4.24 – LCR Strategic Developments

Development	Local Authority Area	Summary
3MG Merseyside Multi-Modal Gateway, Ditton	Halton	Multi-modal freightpark, to generate 5000 gross jobs
Mersey Gateway	Halton	Second Mersey bridge crossing to generate 1600 gross jobs by 2025
Kirby Town Centre Regeneration	Knowsley	To generate 1742 gross jobs

Development	Local Authority Area	Summary
Alchemy Business Park	Knowsley	To generate 1660 gross jobs
Skelmersdale Town Centre Re-development	West Lancashire	To generate 2250 gross jobs

Source: Liverpool City Region Economic Projects and Prospects 2007

- A4.89 Pipeline projects identified include two located within the four local authority areas. The Heath Business & Technical Park, Runcorn, is expected to generate 900 gross jobs. Atlantic Park Phase 4, Bootle is expected to generate 739 gross jobs by 2025.

Second Round Growth Points – Partnerships for Growth (2008)

- A4.90 The Government has approved a number of 'second round growth points', one of which is a joint Growth Point Bid by Halton, St Helens and Warrington.

- A4.91 The combined authority areas deliver over 210,000 local jobs, with growing employment opportunities in Manchester and Liverpool within easy commuting distance. Economic forecasts indicate they will continue the role as a key regional economic driver with the potential to generate an additional 24,000 new jobs up to 2016.

- A4.92 In designating this new Growth Point, Government is partnering the three local authorities to use growth positively to help sustain regeneration efforts, tackle housing affordability and to link areas of future opportunity to areas of need – thus balancing the need for growth and regeneration.

- A4.93 Growth Point status will provide new housing opportunities close to areas of concentrated economic development to maximise the opportunity for people to live close to their place of employment. This will seek to minimise the increase in the 60,000 daily commuter flows into the area.

- A4.94 The status will also facilitate the redevelopment of Runcorn docklands as a residential community of around 4000 dwellings, without impacting on other housing priorities elsewhere in Halton.

West Lancashire Rural Economy Study (West Lancashire LSP, 2006)

- A4.95 The study's objective was to examine how West Lancashire's rural economy works. The key service centres of Skelmersdale, Ormskirk and Burscough were excluded from the study.

- A4.96 The study identified rural West Lancashire as an entrepreneurial area. It provides over half the companies and 40 percent of the jobs in West Lancashire, and has a higher business start-up rate (34 per 10,000 population) than the district as a whole (27), Lancashire or the North West. There is a major food cluster based around the horticultural industry in the northern parishes, with agriculture continuing to be important. Other clusters exist in the manufacturing of engineering and construction products.

- A4.97 Skills and labour supply, together with planning restrictions are perceived as amongst the main challenges faced by businesses located in the rural areas. There is an apparent need for rural business space, with a current absence of proper start-up or move-on business space.

- A4.98 Recommendations made include investigating the potential of a fund to help finance the conversion of disused agricultural buildings into employment sites. Also the undertaking of a live/work audit of the brownfield sites within the rural parts of the

district, to create a live/work policy to supplement the new LDF, and to study the feasibility of a business development centre.

Halton Property Study (Halton Borough Council 2007)

- A4.99 The Halton Property Study included an assessment of employment premises supply and demand. It covered the period to 2016, with the objective of identifying actions the Borough Council might take to encourage economic development.
- A4.100 The study recognised the borough's complicated, complex economy, citing the following contributory factors:
- Historic industrial development
 - Chemical industry sector growth
 - Port-related activities
 - New Town Development Corporation influence in Runcorn only
 - The divide between Widnes and Runcorn
 - Forecast decline for manufacturing (but chemicals to remain static) to be replaced with business services growth
 - Continuing reduction in the size of businesses; growth in self-employment – and implications for type, size and tenure of premises.
- A4.101 Evidence suggested the greater demand being still for industrial space. Also, with 40 percent of enquiries coming from outside the borough, Halton plays an important sub-regional employment role.
- A4.102 Although the study concluded that with 233 ha, Halton appeared to have enough through to 2016, this belies the true situation. Only 90 ha was available for local needs, as 143 ha is committed to strategic investment/specialist sites. It therefore recommended a further 60 ha should be identified to provide range and choice through to 2016, with an even split in this provision north and south of the river.
- Halton Economic Review 2008**
- A4.103 Year on year growth in VAT registered businesses since 1998 has grown by 28 percent to some 2400 businesses.
- A4.104 There is evidence of a relatively substantial gap in the <4 employee band. The Halton figure is 66 percent of all business compared to 74 percent for the North West. Halton also has smaller proportion of businesses in the three lowest turnover bands compared to the North West (i.e. up to £250,000 pa).
- A4.105 Size and turnover profiles reflect the industrial legacy with a concentration of larger scale manufacturing, processing and distribution activities.
- A4.106 Business density (the number of businesses relative to population) is low compared to NW & UK. At 25 per 100 resident population this lags the NW (34) and UK (40). The biggest gaps are in business services and distribution, both areas forming part of the service industry sector which nationally and regionally is forecast to grow. For Halton to attain NW density levels it would need a net increase of around one third of the existing stock of VAT registered businesses.
- A4.107 Cambridge Econometrics estimate there to be £2.2 bn of GVA in Halton in 2007. Within this figure is evidence of a falling contribution of manufacturing. This is now only 23% compared to 50% in 1990s.

- A4.108 An overview of ten years tends to confirm the expectation of a transition from manufacturing towards services taking place and with reliance on the chemicals sector becoming less of a strategic issue.
- A4.109 New business formation has been a primary generator of change and has significantly contributed to this transition process.
- A4.110 Projected change in employment to 2020 sees the finance and business services sector dominating the projected increase, with manufacturing bearing the brunt of expected job losses.
- A4.111 In terms of business enquiries the following are noted:
- Four year period 2004-2007 shows industrial enquiries still dominate (50-60%) though the profile of office and retail is more balanced than has been the case in the past
 - Enquiries are focussed mainly on <5000 sqft (though these are more for retail and offices rather than industrial).
- A4.112 While there is plenty of industrial space, much of it is low quality, not suited to modern needs. Astmoor's problem is its poorly specified properties of the wrong size (too large at 10-20,000 sqft), which have suffered in the past from under-investment.
- A4.113 The Halton UDP identifies 208 ha of employment land for local needs, and as 120 ha was developed between May '96 – May '03, 88 ha is allocated. There is a further 126 ha allocated for strategic regional investment, restricted to RES growth target sectors. These are located at Daresbury Park; 3MG; Hale Bank Road and Daresbury Laboratories.
- A4.114 The 2007 Halton Property Study suggested that 233 ha of employment land was available, of which:
- 7.91 ha Weston Docks – port uses
 - 81.72 ha 3MG – inter-modal freight terminal
 - 41.81 ha Daresbury Park – prestige offices
 - 11.88 ha Daresbury Laboratories – science uses
- A4.115 Much of the land in Widnes is geared to light industrial but is of poor environmental quality. Also much of this is under construction or operational land. This is nominally 40.24 ha but excluding land under construction, being held for the owner's use or higher value uses, reduces this figure to 13.64 ha.
- A4.116 In Runcorn there is no available land at Manor Park and only two infill sites at Astmoor. Land availability in Runcorn totals 6.15 ha.
- A4.117 Take-up of employment land is around 15.3 ha pa, with two-thirds being for B1 and the rest split equally between B2 & B8 uses. Two-thirds of the take-up relates to Runcorn where the more easily developable, greenfield sites are located. As a result, there is less than 20 ha available for local companies (2 years supply) setting aside land for strategic, regional use. Thus Halton needs some 60 ha extra to allow the property market to function effectively.

A Vision for Sefton – Community Strategy 2006-2011 (2006)

- A4.118 The Sefton Borough Partnership has developed the strategy.

- A4.119 Economic development and sustainability is one of four main themes under which priorities and targets have been addressed.
- A4.120 The Strategy comments that Sefton's economic position is healthy, with the number of jobs increasing by 6800 in the period 1999 to 2004. The Port of Liverpool is acknowledged as a dynamic asset contributing to this success, as a driver of local economic development and employment.
- A4.121 Principal challenges faced by the borough, identified from the Merseyside Economic Review 2005 and the LSC Skills Assessment 2006, are noted as:
- The low number and value of businesses, leading to below national average per capita GVA
 - An undynamic start-up market, resulting in below national averages of self employment
 - Key adult skills gaps, both in basic skills and in specific occupations areas
 - A mismatch between the available labour supply and the areas, businesses, sectors and occupations generating the demand for people and skills.

Making it Happen in Halton – Community Strategy, 2006-2011

- A4.122 The document sets out the steps the Local Strategic Partnership needs to take to achieve progress on five strategic themes. Two of these are 'Halton's Urban Renewal' and 'Employment, Learning and Skills'.
- A4.123 The strategy notes that part of Halton's success has been the ability to change and evolve, having coped with the loss of much of the manufacturing industry that underpinned the local economy (and the legacy of deprivation and reduced population caused by this loss).
- A4.124 Amongst the components seen as being crucial to future success is the delivery of thriving places. The local economy has to flourish and provide a range of opportunities for both training and work. The economic infrastructure has to be top quality with a variety of employment land and premises available to support economic prosperity, growth and change.
- A4.125 Key objectives relating to urban renewal make reference to creating and sustaining a twenty-first century business environment with the required variety of sites, premises and infrastructure that can support high levels of investment and economic growth, and increase Halton's competitiveness. Improvement targets related to this include, by 2011:
- GVA per capita levels sustained at or above the regional norm
 - Job numbers increased by 10 percent
 - 50 ha of derelict land brought back into beneficial use
 - facilitate bringing to the market at least 100,000 sqm of new and replacement commercial floorspace.
- A4.126 The strategy comments that there is a sustained mismatch between local business needs and the skills of the working population. To address this, objectives have been set to foster a culture of enterprise and entrepreneurship; to increase the employability of local people and remove barriers to employment, and to develop a strong, diverse, competitive and knowledge-based local economy. Related improvement targets, by 2011, are:
- 2 percent increase in the employment rate
 - To reduce economic inactivity rate by 10 percent
 - To increase self-employment by 20 percent
 - To increase the number of VAT registrations by 15 percent.

Knowsley Sustainable Community Strategy 2008-2023

- A4.127 As part of the vision for Knowsley, by 2023 the Strategy seeks to deliver high quality employment areas which help to drive economic growth in the Liverpool City Region.
- A4.128 Reference is made to the expansion and development of Knowsley's existing business parks, particularly for office premises, and employment growth in the service sector (up to 40 percent by 2023) as key opportunities.
- A4.129 Challenges faced include:
- Declining working age population numbers
 - Continuing need to assist people into employment and encourage enterprise
 - Low businesses density, with an additional 233 VAT registrations per year needed to bring the number of businesses in Knowsley, compared to the number of residents, up to the UK average
 - Low levels of self-employment by comparison to the region and national averages.
- A4.130 Delivering an extra 233 VAT registrations annually for 12 years would result in doubling the current number of businesses in Knowsley to almost 6,000. To meet the national average of people in employment would mean 8,500 more people working (rising to 12,500 if Knowsley is to meet the Government's aspiration of an 80 percent employment rate). 8,500 jobs is assessed as the equivalent to Knowsley Industrial Park or five Kings Business Parks.
- A4.131 As context to addressing the challenges and opportunities, the Strategy notes:
- A declining population over the last 20 years, but the rate of decline is slowing
 - 55,000 people employed, a figure that has increased significantly in absolute terms in the last decade
 - A large number of large industrial bases, concentrated mainly on Knowsley Industrial and Business Park (Kirby); Huyton; Kings and Prescott Business Parks; Ford/Jaguar at Halewood
 - Manufacturing is still strong (10 percent of businesses; over 20 percent of employment with concentrations in the automotive industry and its supply chain, as well as advanced manufacturing and engineering) but the borough is gaining a stronger foothold in the service sector. This trend is likely to continue
 - Economic activity rates are particularly low in North Huyton (just 56 percent of the working age population). Rates in South and North Kirkby are also substantially below the borough's average
 - There are mixed messages about the overall performance of the local authority. GVA per capita is lagging, but since 1998 there has been a 10 percent increase in the business base and substantial numbers of new jobs created.

A Sustainable Community Strategy for West Lancashire 2007-2017

- A4.132 Key objectives of the strategy include *"to create more and better quality training and job opportunities to get more people into work"*.
- A4.133 A small number of priority projects are set out as having the potential to meet many of the needs of the borough's local communities. Relevant to the employment land review are:
- Skelmersdale Vision – a proposal to create a modern town centre for Skelmersdale, including jobs to add more vibrancy

- Market Towns Project – to assist Ormskirk and Burscough in the preparation of town improvement plans
- Rural Economy Study – to establish how the borough’s rural economy is operating and how it might improve its contribution to the local economy
- Inspire Project – includes employment area improvements.

A4.134 The priority projects programme aims to have developed three brownfield employment sites within 5 to 10 years.

Ormskirk and Burscough Market Town Initiative Draft Action Plans (2007)

A4.135 Draft Action Plans have been produced for the two market towns, under the Market Town Initiative funded by the NWDA, with support from West Lancashire Borough Council .

A4.136 Whilst both Action Plans include a section addressing the local economy, only the Burscough plan specifically refers to an action that would provide more employment and boost the economy of the town. This states that incentives need to be developed to persuade more business to locate within the Burscough area. This is a high priority for the medium term, with responsibility identified for the District and Parish Councils.

A4.137 The provision of commercial and industrial property as a component of the action does not appear to be part of the process to persuade more businesses to locate in Burscough. No actions have been identified around property needs. The emphasis is more about business support and development.

Halton – Employment Land Monitoring Report, 2008

A4.138 Between 1996 and 2008 some 205 ha of employment land development was completed. 52 percent of the land was on greenfield sites.

A4.139 The figure equates to an annual take-up rate of 17.12 ha, with 68 percent being in Runcorn and 32 percent in Widnes (11.69 and 5.42 ha per annum respectively). 2007-2008 saw an above average performance, with 24.59 ha completed on a total of 12 sites. This continues the trend of the last three years. Only 25 percent of this was in Widnes (6.07 ha) and less than half (11.38 ha) represented sites allocated in the Halton UDP.

A4.140 Only 1.03 ha was lost to residential use, and none of the three sites involved were in employment or economic regeneration areas.

A4.141 The land availability at May 2008 is stated as 210.02 ha. This comprises of 62 sites. Only 30 sites are UDP allocations, and these total 175.41 ha. However, the majority of this amount relates to regional investment sites – Daresbury Park (43.87 ha); Daresbury Laboratories (8.38 ha); Ditton Strategic Rail freight Park (74.4 ha). Around 55 percent of the available supply is greenfield land.

A4.142 The breakdown of the supply, between Runcorn and Widnes, and between local and strategic sites is shown in Table A4.25.

Table A4.25 – Halton Employment Land Availability, May 2008

Location	Strategic Sites		Local Sites		Total	
	No.	Ha	No.	Ha	No.	Ha
Runcorn	9	52.20	21	33.41	30	85.61
Widnes	3	68.46	29	52.95	32	121.41

Location	Strategic Sites		Local Sites		Total	
	No.	Ha	No.	Ha	No.	Ha
TOTAL	12	120.66	50	86.36	62	207.02

Source: Halton Employment Land Sites Compendium, 2008

A4.143 It should be noted there is an unexplained discrepancy of 3 has between the headline figure stated in the Monitoring Report and the site by site identified areas.

A4.144 Additional points noted from the baseline information are:

Runcorn

- 21.76 ha represent UDP allocations
- 63.46 ha have planning consents
- 0.39 ha has a lapsed consent
- of 21 local sites only 3 are larger than 4 ha and 12 are less than 1 ha
- 17 of the 30 sites are greenfield (70.80 ha).

Widnes

- 84.99 ha represent UDP allocations (68.46 ha being the Ditton SRFP site)
- 35.46 ha have planning consents
- 0.96 ha has a lapse consent
- only 3 of the 32 sites are greenfield (15.78 ha).

Knowsley – Development Land Availability, April 2008

A4.145 Knowsley's employment land supply figure is calculated from a GIS database provided by the Borough Council as part of the study baseline information. Table A4.26 details the supply of 156.77 ha, broken down to the key employment locations in the borough. This comprises of 54 sites, with almost half being at Knowsley Industrial Park.

Table A4.26 – Knowsley Employment Land Availability, April 2008

Location	UDP Allocations Without Planning Consent		Planning Consent		Primarily Industrial Area		Total	
	No. of Sites	Area, ha	No. of Sites	Area, ha	No. of Sites	Area, ha	No. of Sites	Area, ha
Huyton	3	10.34	4	1.68	3	4.6	10	16.62
Knowsley Business Park	10	10.30	-	-	2	0.71	12	11.01
Knowsley Industrial Park	18	46.28	4	7.29	4	15.32	26	68.89
Kings Business Park	1	6.59	2	3.58	-	-	3	10.17
Prescot	2	31.64	-	-	-	-	2	31.64
Halewood	1	18.44	-	-	-	-	1	18.44
TOTAL	35	123.59	10	12.55	9	20.63	54	156.77

Source: Knowsley MBC, 2008

A4.146 Whilst Table A4.26 provides details of the considered land supply, Table A4.27 identifies the supply that is understood to be immediately available and on the market. This data was also provided by Knowsley Council at the outset of the study.

The data was supplied in imperial measurements, but has been converted to metric to align with the rest of the report. As a result there may be some minor adjustments between individual sites and total figures. The available supply of 32.12 ha represents less than 20 percent of the 172.60 ha referred to above. For consistency the breakdown follows the same key employment areas.

Table A4.27 – Knowsley Employment Land Availability, April 2008

Location	Site	Site Area, ha	Area Sub Total, ha
Huyton	Chapel Brook, Huyton Business Park	0.40	3.63
	Wilson Road, Huyton Industrial Park	1.21	
	Wilson Road, Huyton Industrial Park	2.02	
Knowsley Business Park	Plot 11 Randles Road	0.33	2.68
	Plot 10 Randles Road	0.33	
	Plot 8B Randles Road	0.55	
	Plot 3 Randles Road	0.66	
	Plot 6 Randles Road	0.81	
Knowsley Industrial Park	Alchemy	6.07	23.14
	Ashcroft Road	0.05	
	A580 East Lancashire Road	0.36	
	Britonwood	0.36	
	Woodward Road	0.61	
	Orchard Works, Webber Road	0.73	
	Image Business Park	2.83	
	Black Jack, Hornhouse Lane	2.83	
	Britonwood	4.65	
	Academy Business Park	4.65	
Kings Business Park	Tiger Court	0.65	2.67
	Kings Business Park	2.02	
TOTAL		32.12	32.12

Source: Knowsley MBC, 2008

A4.147 Information on individual site's take-up for the period 1998 to 2008 has also been provided. Again it has been necessary to convert from imperial to metric measurements. Table A4.28 summarises the information.

Table A4.28 – Knowsley Employment Land Take up 1998-2008 by Location

	Huyton, ha	Knowsley Business Park, ha	Knowsley Industrial Park, ha	Kings Business Park, ha	Prescot, ha	Total, ha
1998-1999	-	4.05	25.49	-	-	29.54
1999-2000	1.21	2.83	6.07	-	-	10.11
2000-2001	0.81	-	-	18.21	-	19.02
2001-2002	4.05	8.90	2.43	-	-	15.38

	Huyton, ha	Knowsley Business Park, ha	Knowsley Industrial Park, ha	Kings Business Park, ha	Prescot, ha	Total, ha
2002-2003	-	5.67	12.14	-	-	17.81
2003-2004	0.81	1.21	4.86	-	-	6.88
2004-2005	-	-	-	-	-	-
2005-2006	-	0.81	12.14	-	-	12.95
2006-2007	-	-	-	-	6.88	6.88
2007-2008	-	2.02	4.86	-	-	6.88
TOTAL	6.88	25.49	67.99	18.21	6.88	125.45

Source: KMBC, 2008

A4.148 As with the supply figures, Knowsley Industrial Park dominates the locations where take-up has occurred. As with the adjoining Business Park there has been almost continual activity since 1998.

West Lancashire – Employment Land Monitoring Report, 2008

A4.149 The Monitoring Report states that at May 2008, West Lancashire's land availability comprised 16 sites and a total of 63.17 ha. Three quarters of the sites (52.25 ha) are Greenfield. With the exception of two in Burscough, the greenfield sites are all in Skelmersdale. The brownfield sites represent locations in Banks, Ormskirk, Appley Bridge and Simonswood. The available land is identified in Table A4.29

Table A4.29 – West Lancashire Employment Land Availability, May 2008

Location	Local Plan Site Ref	Area, ha
Pimbo	DE5 1.2	3.50
	DE5 1.5	0.71
Stanley	DE5 1.12	0.47
	DE5 1.7	3.81
	DE5 1.13	0.84
	DE5 1.14	12.97
Gillibrands	DE5 1.15	1.78
	DE5 1.16	1.27
White Moss	DE5 1.17	13.18
Cobbs Clough	DE5 1.18	9.82
Burscough	DE5 1.20	0.83
	DE5 1.21	3.11
Appley Bridge	DE5 1.23	0.38
Simonswood 1	DE5 1.24	5.02
Greaves Hall Banks	DE5 1.26	5.21
Ormskirk	DE5 1.27	0.24

Source: West Lancashire Employment Land Monitoring Report, 2008

A4.150 In addition to the allocated but undeveloped land, the Monitoring Report notes that based on details of vacant and available floorspace, there is a further 24.7 ha of land supply. This comprises 16 ha of B2 use; 8 ha of B8 use and 0.7 ha of B1.

Forty percent of this supply is located in Skelmersdale, with 10 percent in Burscough and 5 percent in Ormskirk.

A4.151 The low figure for B1 space reflects comment that there is only limited availability of such premises, even though there are sites allocated. There is also a limited supply of land remaining in Skelmersdale for B2 activity, although there are sites in Simonswood and Burscough. And only at XL Business Park is there any B8 use land (13 ha).

A4.152 Details of take-up since 2001-2002 are provided in Table A4.30. These indicate an annual take-up rate of 8.77 ha, based on the figures. However, the Monitoring Report quotes a take-up rate of only 4 ha. It notes that since 2004, 7.98 ha of employment land has either been lost to other uses or reallocated in the Local Plan process. One site is now a football stadium; one was already occupied for employment use and should not have been identified as available; one is reallocated as a 'Development Opportunity Site', with 50 percent at least to be for employment use.

Table A4.30 – West Lancashire Employment Land Take-up 2001-2008

Year	Number of Sites	Land Take-Up, ha
2001-2002	5	5.80
2002-2003	1	12.62
2003-2004	7	28.32
2004-2005	3	4.69
2005-2006	1	3.11
2006-2007	3	5.44
2007-2008	3	1.44
TOTAL	23	61.42
Annual Take-up	-	8.77

Source: West Lancashire Employment Land Monitor, 2008

A4.153 That the take-up and availability figures total only 125 ha, rather than the 145 ha target set in the Joint Lancashire Structure Plan, is explained by the Plan Inspector's decision not to release Green Belt land at Pimbo and Whitemoss. These were proposed extensions to the existing estates.

Employment Land Studies – Adjacent Merseyside Authorities

A4.154 Employment Land Reviews have been commissioned by both Liverpool City Council and St Helens Metropolitan Borough Council. As these two authorities have at least one common boundary with either Halton, Knowsley, Sefton or West Lancashire, current status summaries are provided for background context.

Liverpool City Council

A4.155 An employment land review was completed in May 2008. This has shown the need to retain the existing 330 ha supply, in order to accommodate demand through to 2024. The review has concluded there is no need for additional allocations.

A4.156 The review includes a number of conclusions and recommendations of potential relevance to the four districts study:

- To resolve shortfall in the City Centre, the Atlantic Gateway SIA is seen as a potential solution. This would require a concerted public sector effort, and

an approach not dissimilar to that undertaken in Speke Halewood SIA (with particular emphasis on land assembly)

- There is sufficient supply to accommodate demand at Speke Halewood, as well as a clear mismatch in the supply. This is partly due to land being classed as general industrial, whilst the driver of demand is warehousing
- The Eastern Approaches and Approach A580 have an oversupply, but it is assumed this will accommodate some 'spill over' from the excess demand identified in the Speke Halewood SIA
- The Atlantic Gateway has a mismatch in supply (93 ha of general industrial land is identified against demand for 9 ha of office sites). As a consequence further work is to focus in more detail on the potential for North Liverpool (and therefore Atlantic Gateway SIA) in this context.

A4.157 The headline city-wide level demand is actually identified as 278 ha. This is seen as minimum requirement, given that it takes no account of churn, choice or mixed use development in the future. Hence the need to retain the existing 330 ha supply.

St Helens Metropolitan Borough Council

A4.158 In 2005 St Helens completed an employment land position statement, which appraised some 239 ha (including potentially 132 ha at Parkside – a proposed strategic rail freight site). Key points raised in the review were:

- Only 33 ha available and capable of development within five years
- The most attractive sites are located either at Haydock or on the M62 Link Road (therefore close to both Halton and Knowsley)
- There is a legacy of redundant industrial areas in need of regeneration that could provide significant employment land for the future. But much of what has already been regenerated has been for higher value uses due to the significant remediation costs involved in bringing the sites back into use
- Challenge of competing with Omega's future supply. Whilst it is a significant opportunity for borough residents, it may impact on delivering regenerated brownfield sites in St Helens.

A4.159 In May 2008 St Helens commissioned further work (still ongoing) to examine its economic needs gap. This includes a review of the availability, quality, marketability of the existing employment land and premises portfolio, and to forecast supply needs to 2024. The study is using, as its baseline, the employment land monitoring position reported in November 2007. This position is summarised in Table A4.31.

Table A4.31 – St Helens LDF Economic Land Provision 2007

	Ha	Total, ha
Base supply identified in 2005	93.76	
New sites brought forward 2005-07	4.82	98.58
Developed for economic development 2005-07	12.45	86.13
Developed for non-economic uses/removed from supply	15.17	70.96
New sites introduced from NLUD Survey 2007	14.54	95.50

Source: St Helens LDF 2007

A4.160 Of the 2007 supply figure of 95.50 ha, 36 percent (34.63 ha) is assessed as 'Group 1' sites i.e. available within five years. And based on the average annual take-up rate of 7.02 ha, calculated from the last decade's performance, there is insufficient supply to meet short-term demand. The scale of 'Group 2' sites (not available for at least five years) reflects a mix of constraints such as contamination, ownership,

owners' aspirations, infrastructure that could prevent the land from being brought forward for development.

Strategic Housing Land Availability Assessments

A4.161 All four local authorities have undertaken SHLAAs and from these details of employment sites considered as part of the process have been collated. Tables A4.32 to A4.35 provide the individual area details, with breakdowns to the sub-areas defined in the Employment Land study brief.

Table A4.32 – Employment Land Reviewed for SHLAA – Halton

Area	Allocated Employment Sites		Existing Employment Areas	
	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha
Widnes	2	3.44	16	20.43
Runcorn	2	2.02	16	39.92
Total	4	5.46	32	60.35

Source: Halton MBC 2008

Table A4.33 – Employment Land Reviewed for SHLAA – Knowsley

Area	Allocated Employment Sites		Existing Employment Areas	
	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha
Kirkby Industrial Parks	0	0.0	0	0.0
Kirkby	0	0.0	0	0.0
Huyton Industrial Parks	2	12.35	0	0.0
Huyton	0	0.0	0	0.0
Prescot	1	8.14	2	1.87
Other areas	0	0.0	0	0
Total	3	20.49	2	1.87

Source: Knowsley MBC 2008

Table A4.34 – Employment Land Reviewed for SHLAA – Sefton

Area	Allocated Employment Sites		Existing Employment Areas	
	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha
North Sefton	1	0.92	10	15.22
South Sefton	3	14.31	26	45.25
Total	4	15.23	36	60.47

Source: Sefton MBC 2008

Table A4.35 – Employment Land Reviewed for SHLAA – West Lancashire

Area	Allocated Employment Sites		Existing Employment Areas	
	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha
Skelmersdale	0	0.0	0	0.0
Ormskirk	0	0.0	1	3.90
Burscough	0	0.0	3	4.70
Other areas	1	13.07	5	4.89
Total	1	13.07	9	13.49

Source: West Lancashire BC 2008

Table A4.36 – Call for Sites – Halton

Area	Allocated Employment Sites, Proposed for Other Uses		Existing Employment Areas, Proposed for Other Uses		Land Proposed for Employment Uses		Land Proposed for Mixed-Use (or with Employment as Second Choice)	
	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha
Widnes	0	0.00	0	0.00	1	1.80	1	0.04
Runcorn	1	1.49	1	0.50	3	33.95	4	18.06
Total	1	1.49	1	0.50	4	35.75	5	18.10

Source: Halton MBC 2008

Table A4.37 – Call for Sites – Knowsley

Area	Allocated Employment Sites, Proposed for Other Uses		Existing Employment Areas, Proposed for Other Uses		Land Proposed for Employment Uses		Land Proposed for Mixed-Use (or with Employment as Second Choice)	
	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha
Kirkby Industrial Parks	0	0.00	0	0.00	0	0.00	0	0.00
Kirkby	0	0.00	0	0.00	0	0.00	0	0.00
Huyton Industrial Parks	3	14.87	0	0.00	0	0.00	0	0.00
Huyton	0	0.00	1	1.11	0	0.00	0	0.00
Prescot	0	0.00	0	0.00	0	0.00	2	0.24
Other areas	0	0.00	0	0.00	2	97.86	30	314.9
Total	3	14.87	1	1.11	2	97.86	32	315.14

Source: Knowsley MBC 2008

Table A4.38 – Call for Sites – Sefton

Area	Allocated Employment Sites, Proposed for Other Uses		Existing Employment Areas, Proposed for Other Uses		Land Proposed for Employment Uses		Land Proposed for Mixed-Use (or with Employment as Second Choice)	
	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha
North Sefton	0	0.00	1	0.10	2	20.08	12	76.02
South Sefton	1	2.82	6	3.64	1	25.53	15	164.62
Total	1	2.82	7	3.74	3	45.61	27	240.64

Source: Sefton MBC 2008

Table A4.39 – Call for Sites – West Lancashire

Area	Allocated Employment Sites, Proposed for Other Uses		Existing Employment Areas, Proposed for Other Uses		Land Proposed for Employment Uses		Land Proposed for Mixed-Use (or with Employment as Second Choice)	
	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha
Skelmersdale*	1	9.82	2	2.57	5	96.97	0	0.00
Ormskirk	0	0.00	3	6.35	0	0.00	0	0.00
Burscough	0	0.00	4	4.83	5	43.85	4	36.24
Other areas	0	0.00	4	15.67	17	130.96	12	54.63
Total	1	9.82	13	29.42	27	271.78	16	90.87

Source: West Lancashire BC 2008

*Excludes an undefined amount of land to be put forward for offices in the 95 ha Skelmersdale Town Centre Redevelopment Scheme.